Employee Post-Travel Disclosure of Travel Expenses

SECRETA DATE THE SENATE

2019 OCT 29 AM 10: 41

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

travel. Submit all form	is to the Office of Pul	blic Records in 232 Hai	rt Building.	
In compliance with Rube reimbursed/paid for	* * * * * * * * * * * * * * * * * * * *	_	sures with respect to	travel expenses that have been or will
A copy of the Priva	ate Sponsor Travel Ce	rization (Form RE-1), a rtification Form with all	attachments (itinerar	y, invitee list, etc.)
Private Sponsor(s) (list	tali): The Aspen In	stitute (Education &	Society)	
Travel date(s): Oct. 2	_		•	
Name of accompanyin Relationship to Travelo	-	ny): Child		<u>-</u>
	OSTS IN EMPLOYEE	EASE DUE TO THE ACC EXPENSES. (Attach addi		SE OR DEPENDENT CHILD, ONLY
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☑ Good Faith Estimate	· \$415	\$130	\$75	N/A
☐ Actual Amount				
Expenses for Accomp	anying Spouse or De	pendent Child (if applic	able):	\
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate	N/A	N/A	N/A	N/A
☐ Actual Amount				
_	- - -			ttach additional pages if lest Community Initiative, 10/2;
networking dinner	, 10/2; two educat	ional sessions at the	Foundation for th	ne Carolinas,10/3
10 28 19 (Date)	Scott Wi (Printed r	nship name of traveler)		(Signature of traveler)
TO BE COMPLETED	BY SUPERVISING	MEMBER/OFFICER:		•
I have made a determin	nation that the expense	es set out above in conne	ctions with travel des	cribed in the Employee Pre-Travel

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

(Signature of Supervising Senator/Officer)

(Revised 1/3/11)

Form RE-1

(Revised 10/19/15)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler:	Scott Winship
Employing Office/Committee:	Joint Economic Committee
Private Sponsor(s) (list all):	The Aspen Institute
1:4701 0410(3)	2- 3, 2019 e trip for any reason you <u>must</u> notify the Committee.
Destination(s): Charlotte, NC	
Explain how this trip is specifically	onnected to the traveler's official or representational duties:
research effort to examine the heat policy agenda to expand opportun	r of the Joint Economic Committee, I run the Social Capital Project. The Project is a th of families, communities, and civil society. The focus of the project is to develop a y through solutions that leverage social capital. The initiatives in Charlotte are an forts to expand opportunity, and learning more about them will benefit our work."
Name of accompanying family mem Relationship to Employee: Spou	
I certify that the information contain	d in this form is true, complete and correct to the best of my knowledge:
8/30/19	
(Date)	Signature of Employee)
TO BE COMPLETED BY SUPERVISI Secretary for the Majority, Secretary for	NG SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms the Minority, and Chaplain):
Chairman Mike Le	e Scott Winship
(Print Senator's/Officer's N	
related expenses for travel to the eve	sion, to accept payment or reimbursement for necessary transportation, lodging, and at described above. I have determined that this travel is in connection with his or her iceholder, and will not create the appearance that he or she is using public office for
I have also determined that the attentof the Senate. (signify "yes" by checking	ance of the employee's spouse or child is appropriate to assist in the representation g box)
8/29/21/9 (Date)	(Signature of Supervising Senator/Officer)



August 14, 2019

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming Mobility from Poverty retreat for Senior Congressional Staff from 11:30 AM Wednesday, October 2, 2019 to 4:00 PM Thursday, October 3, 2019 at the Omni Hotel, 132 E Trade St., Charlotte, NC 28202.

At this convening, staffers learn about how economic mobility has changed over time and the challenges affecting policymakers' efforts to increase economic mobility in America. Charlotte is an extraordinary context for learning about mobility from poverty efforts because of unprecedented government, private-sector, philanthropic, and civil society engagement and coordination on this topic. Harvard economist Raj Chetty identified Charlotte as the major metropolitan area in the United States with the least upward mobility among its young people, which provoked the *Leading on Opportunity* task force and resulting recommendations that create a frame for our site visit and learning together. Staffers will learn about recent evidence on the effectiveness of interventions designed to address the impact of segregation and the role of social capital in accessing opportunity. The convening will focus on potential roles for Congress and the executive branch in increasing mobility from poverty and will create opportunity for dialogue with beneficiaries, service providers, and local/state policymakers. Finally, the retreat will provide an opportunity for staffers to engage in their own learning and build working relationships with colleagues from different parties and chambers and with leading experts in the field.

We are committed to working with you and the House Ethics Committee to ensure compliance with the House rules regarding privately-funded sponsored travel. Enclosed you will find all the forms necessary for filing the trip with the Ethics Committee:

A detailed agenda listing discussion sessions

- A completed Primary Trip Sponsor Form
- A list of invited House staffers
- A blank Traveler Form
 Completed Grantmaking Trip Sponsor Form from the Bill & Melinda Gates Foundation

You must complete the Traveler Form and submit it with the enclosed agenda, list of invited staffers, and Primary Trip Sponsor Form directly to the Senate Ethics Committee (220 Hart) no later than Friday, August 30, 2019. After receiving the completed travel package, the Ethics Committee will review and issue an approval to you or your sponsoring Member. After the trip, you will need to complete a post-travel form that we will email to you after the site visit.

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations – no government, individual, foreign, corporate, or special interest money is accepted. The retreat is supported by The Bill & Melinda Gates Foundation. The Aspen Education & Society Program maintains autonomy over invitations, materials, and the agenda for the retreat.

The retreat will begin at 11:30 AM on Wednesday, October 2, 2019, at Omni Hotel and will conclude at 4:00 PM on Thursday, October 3, 2019. Please plan your travel accordingly in order to be present for the duration of the retreat. Dress is business casual for all meetings.

The retreat promises to be productive and informative. We look forward to seeing you there.

Warm regards,

Ross Wiener

Doug Mesecar



EDUCATION & SOCIETY PROGRAM

August 22, 2019

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming retreat: "One Community's Efforts to Increase Mobility with a Focus on Housing and Social Capital" for the Aspen Senior Congressional Staff Network on Mobility from Poverty. The retreat starts on Wednesday, October 2nd, 2019 at the The Renaissance West Community Initiative at 11:30 AM. The retreat will conclude on Thursday, October 3rd at 4:00 PM.

In addition to a site visit to the Renaissance West Community Initiative, we will be joined by interdisciplinary and diverse panels of policy experts and practitioners for facilitated discussions of issues related to mobility from poverty. This convening will provide staff with an off-the-record opportunity to learn about and discuss a set of issues related to mobility from poverty with a focus on the Charlotte community's efforts to understand and address structural and intergenerational barriers to escaping poverty, including the roles of affordable housing and social capital. In addition, senior staffers will have the opportunity to engage in active learning and build working relationships with scholars and practitioners in the field, with state and local officials, and with colleagues from different parties and chambers. Staff will also have time to explore potential roles for Congress and Executive Branch agencies in increasing mobility from poverty.

We are committed to working with you and the Senate Ethics Committee to ensure compliance with the Senate rules regarding privately-funded sponsored travel. Enclosed you will find all the forms necessary for filing the trip with the Ethics Committee:

- A detailed agenda listing discussion sessions
 - A completed Private Sponsor Travel Certification Form and appendix
 - A list of invited Senate staffers
 - A blank Employee Pre-Travel Authorization form

You must complete the Traveler Form and submit it with the enclosed agenda, list of invited staffers, and Primary Trip Sponsor Form directly to the Senate Ethics Committee on Ethics (220 Hart) no later than **Friday, August 30, 2019**. After receiving the completed travel package, the Ethics Committee will review and issue an approval to you or your sponsoring Member. After the trip, you will need to complete a post-travel form that we will email to you after the site visit.

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations; no government, individual, foreign, corporate, or special interest money is accepted. The Network is supported by The Bill & Melinda Gates Foundation. The Aspen Education & Society Program maintains autonomy over retreat invitations, materials, and agenda.

If you have any questions in advance of the retreat, please do not hesitate to contact Doug Mesecar at (703) 887-3738. The retreat promises to be productive and informative. We look forward to seeing you in Charlotte, NC on Wednesday, October 2nd.

Warm regards,

Ross Wiener

Doug Mesecar

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

The Aspen Institute, Inc. (Education and Society Program)					
De	scription of the trip: Aspen Institute Education and Society program sponsored convening for senior				
	ucation staffers on mobility from poverty.				
Da	tes of travel: October 2-3, 2019				
Pla	ce of travel: Charlotte, NC				
Na	me and title of Senate invitees: Attached.				
l ce	ertify that the trip fits one of the following categories:				
X	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.				
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).				
X	l certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.				
X	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.				
	ertify that:				
X	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for <i>de minimis</i> lobbyist involvement.				
X	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).				

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a
	foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
11. 12.	
	by-hour), complete, and final itinerary for the trip.
	by-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip:
	by-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip: The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and
	by-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip: The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and
12.	by-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip: The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and execution of the convening. (see continued response)
12.	by-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip: The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and execution of the convening. (see continued response) Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
12.	by-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip: The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and execution of the convening. (see continued response) Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: The Aspen Institute is an educational and policy studies non-profit organization whose mission is to foster
12.	by-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip: The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and execution of the convening. (see continued response) Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: The Aspen Institute is an educational and policy studies non-profit organization whose mission is to foster leadership based on enduring values and provide a non-partisan forum for the exchange of ideas.
13.	by-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip: The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and execution of the convening. (see continued response) Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: The Aspen Institute is an educational and policy studies non-profit organization whose mission is to foster leadership based on enduring values and provide a non-partisan forum for the exchange of ideas. (see continued response)
13.	by-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip: The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and execution of the convening. (see continued response) Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: The Aspen Institute is an educational and policy studies non-profit organization whose mission is to foster leadership based on enduring values and provide a non-partisan forum for the exchange of ideas. (see continued response) Briefly describe each sponsor's prior history of sponsoring congressional trips:

.,,
ÇĎ
(1
ÇĢ
C
C)
C
C
C
C
C
C
C

	holds numerous education	nal activities, includ	ing educational briefir	ngs, roundtable		
forums, and conferences for a diverse range of attendees including federal and state policymak						
business and organ	izational leaders, member	s of the press and t	he general (see cont	inued response		
Total Expenses for Each Participant:						
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expense		
Good Faith estimate	\$415 (roundtrip coach airfare, local shuttle transportation)	\$130	\$75	none		
Actual Amounts						
State whether a) the trip involves an event that is arranged or organized without regard to congressional participation or b) the trip involves an event that is arranged or organized specifically with regard to congressional participation: b) The trip is organized specifically with regard to Congressional staff participation to support their learning						
on issues related to mobility from poverty.						
on issues related to	mobility from poverty.					
	mobility from poverty.	or trip				
Reason for selecting	<u></u>	•	area ranked last amo	ng the 50		
Reason for selecting In a recent study by	the location of the event of	hetty, the Charlotte		ng the 50		
Reason for selecting In a recent study by largest metro areas	the location of the event of the Harvard economist Raj C	hetty, the Charlotte lity (see continued		ng the 50		
Reason for selecting In a recent study by largest metro areas	the location of the event of Harvard economist Raj Clin the US for upward mobile of hotel or other lodging fa	hetty, the Charlotte lity (see continued		ng the 50		
Reason for selecting In a recent study by largest metro areas Name and location of Omni Charlotte Hote	the location of the event of Harvard economist Raj Clin the US for upward mobile of hotel or other lodging fa	hetty, the Charlotte		ing the 50		

21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:					
	Lodging is \$130 per day, which is \$1 higher than the per diem rate (which changed to \$129 on 10/1/19)					
	Meals are 10/2/19 \$45 per day and 10/3/19 \$30 per day, which is lower than the per diem rate.					
	· · · · · · · · · · · · · · · · · · ·					
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:					
	Roundtrip coach commercial airfare; local shuttle bus transportation (coach-class)					
	· · · · · · · · · · · · · · · · · · ·					
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).					
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:					
	None					
25.	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor): Signature of Travel Sponsor:					
	Signature of Travel Sponsor: Mist fem					
	Name and Title: Elliot Gerson, Executive Vice President, Policy & Public Programs					
	Name of Organization: The Aspen Institute					
	Address: 2300 N Street NW, Suite 700, Washington, DC 20037					
	Telephone Number: 202-736-5859 (Lisa Jones, Deputy General Counsel)					
	Fax Number: 202-467-0790					
	E-mail Address: lisa.jones@aspeninst.org					

The Aspen Institute Education & Society Program
Appendix to Private Sponsor Travel Certification Form
Senior Mobility from Poverty Retreat, October 2-3, 2019.

Question 5. Name and title of Senate invitees.

Jeff Wrase	Deputy Staff Director	Senate Finance Committee		
Jennifer Kuskowski	Policy Advisor	Senate Major Leader McConnell		
Ryan Martin	Senior Human Services Advisor	Senate Finance Committee		
Amy Marie Pellegrino Health Policy Director		Senate Special Committee on Aging		
Tim Carlton Policy Advisor		Senator Cassidy		
Scott Winship	Executive Director	Senate Joint Economic Committee		
Charles Cogar	Legislative Director	Senator Scott		
Beth Nelson	Senior Health Policy Advisor	Senate HELP Committee		
Laura Berntsen	Minority Chief Human Services Advisor	Senate Finance Committee		
Gabriella Camozzi	Legislative Assistant	Senator Durbin		
Beth Cooper	Professional Staff	Senate Banking Committee		
Nikki McKinney	Professional Staff	Senate HELP Committee		
Kara Marchione	Director of Education Policy	Senate HELP Committee		
Jordan Hynes	Professional Staff	Senate HELP Committee		
Courtney Temple	Legislative Director	Sen. Tillis		

Question 12. Briefly describe the role of each sponsor in organizing and conducting the trip (response continued) -- The Bill & Melinda Gates Foundation is not a sponsor of this trip and did not play a role in organizing, planning or conducting the trip. The Foundation provided grant funding to support the Aspen Institute Education & Society Program, including the Aspen Senior Congressional Education Staff Network; however, the Foundation did not earmark any funding for this trip.

Questions 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to the mission (response continued) – The Aspen Institute Education and Society Program seeks to provide a neutral forum to aid education policymakers in their efforts to improve K-12 public education. The purpose of the trip is to conduct a non-partisan educational retreat that encourages of the-record, candid exchanges of ideas to support staffers' learning.

Question 15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips) (response continued) – The Aspen Institute organizes numerous

educational activities, including educational briefings, roundtables, forums and conferences for a diverse range of attendees including federal and state policymakers, business and organizational leaders, members of the press and the general public. The Aspen Institute Education and Society Program works with federal, state and local education leaders to improve K-12 student achievement, particularly for underserved students.

Question 18. Reason for selecting the location of the event or trip (response continued) -- Staff will hear from Charlotte leaders about their response to this finding and what factors contributed to the ranking.



Aspen Retreat for Senior Congressional Staff Network on Mobility from Poverty

One Community's Efforts to Increase Mobility with a Focus on Housing and Social Capital

Omni Hotel 132 E Trade St. Charlotte, NC 28202

October 2 - 3, 2019

AGENDA

Retreat Goals:

Deeply examine how Charlotte and surrounding Mecklenburg County, North Carolina, are responding to low rates of mobility from poverty through significant private-sector, non-profit, philanthropy, and public-sector coordination;

- Directly engage with low-income North Carolinians and direct-service providers to understand their experiences, as well as with business and government leaders and policy experts to understand how federal funding and policies are influencing the work in Charlotte and Mecklenburg County;
- Examine how housing policies and decisions enable and/or inhibit proximity to employment opportunities and the crucial role social capital plays in mobility from poverty;
- Engage in active learning and build working relationships with experts and practitioners from various fields of expertise, as well as with colleagues from different parties and chambers.

Wednesday, October 2, 2019

8:30 - 9:30 AM	Participants arrive at Charlotte airport (see p. 6 for flight information)		
9:30 – 10:00 AM	Participants arrive at Omni Hotel		
	Transportation to Omni Hotel, 132 E Trade St., Charlotte, NC 28202		
11:00 AM	Aspen staff and participants will depart hotel on chartered bus for Renaissance West Community Initiative, 3610 Nobles Ave, Charlotte, NC		
11:30 AM	Arrive at Renaissance West Community Initiative		
	Location: 3610 Nobles Ave, Charlotte, NC		
11:30 – 12:30 PM	Working Lunch – Welcome, Introductions, Overview of Convening		
	Location: Renaissance West Community Initiative		



Faculty:

• Ross Wiener, Aspen Institute

After introductions and context-setting, Congressional staff and faculty members will share two learning objectives for the convening.

12:45 - 1:00 PM

Break

12:45 - 2:00 PM

Session I: Understanding the Charlotte context: Leading on Opportunity Task Force

Faculty:

- Dr. Ophelia Garmon-Brown, SVP, Community Wellness and Education,
 Novant Health, Co-chair, Leading on Opportunity Task Force
- Mr. Dee O'Dell, Senior Vice President, US Bank, Co-chair, Leading on Opportunity Task Force and US Bank

Guiding questions:

What provoked the Leading on Opportunity Task Force? What motivated each of you to invest in leading this effort as co-chairs? What are your most important learnings about mobility, and about Charlotte, as a result of co-chairing the Task Force?

How did the Leading on Opportunity Task Force determine the cross-cutting factors
of racial segregation and social capita, and the specific content areas the Task Force
ultimately agreed on? What were other important ideas you explored but ultimately
did not prioritize, and why?

What are your reflections two and a half years since publication of the Task Force Report? Where has progress been swifter and deeper than you anticipated, and what challenges and emerging issues are most important to acknowledge and address?

2:00 - 2:15 PM

Break

2:15 - 5:15 PM

Site visit: Renaissance West Community Initiative

Key site visit participants:

- William "Mack" McDonald, CEO, Renaissance West Community Initiative and other RWCI staff
- Ann Clark, RWCI Board Member, former Superintendent of CMS

Timeline:

- Introduction and tour of the RWCl facility (30 minutes).
- RWCl panel discussion (45 mins)
- Small group roundtables with RWCl families and service providers (75 minutes)
- Reflection on conversations (30 minutes)

Guiding questions for panel discussion:

- What is the history of the Renaissance West Community Initiative (RWCI)? How does it reflect Charlotte's history and urban development, and how is it unique?
- What is the profile of RWCI residents and beneficiaries? Who is not able to be served by RWCI and what are alternatives in Charlotte and Mecklenburg County



for residents who could benefit from RWCI but can't get in? In what ways does RWCI ameliorate and in what ways does RWCI exacerbate the history of racial segregation in Charlotte?

- How do Federal programs support RWCI efforts to serve Charlotte, like Hope IV, housing vouchers, and/or the Community Development Block Grant, as well as others? What additional state and local programs support RWCI? What role does philanthropy play in RWCI?
- What are the lessons from RWCI that should inform future investment and policy?

For break-out discussions:

- How is RWCI different from the community you lived in previously? How do you access the services that RWCI offers, and how does RWCI facilitate your engaging in the broader Charlotte community? What do you wish you could change about RWCI?
- Who are the primary partners of RWCI and what services are offered here? What facilitates coordination across service providers, and what makes coordination hard?

5:15 – 6:00 PM Transportation to Hotel

Location: Omni Hotel, 132 E Trade St., Charlotte, NC 28202

7:00 – 7:30 PM Transportation to Dinner

Location: Community Culinary School of Charlotte (CCS), 9315-D Monroe Road, Charlotte, NC

7:30 – 9:00 PM Networking Dinner with Expert Faculty

Staffers will have the opportunity to network with participants during the reception.

Remarks by Richard Reeves, Brookings Institution

9:00 – 9:30 PM Transportation to Hotel

Location: Omni Hotel, 132 E Trade St., Charlotte, NC 28202

Thursday, Oct. 3, 2019

8:00 – 8:30 AM Walk to Foundation for the Carolinas

Location: 220 N. Tryon St. #2137, Charlotte, NC 28202

8:30 – 9:00 AM Continental Breakfast



9:00 – 10:15 AM Session II: Affordable Housing and Mobility: Lessons for Policy

Faculty:

- Anthony Trotman, Assistant County Manager, Mecklenburg County
- Dionne Nelson, Laurel Street Residential
- Fulton Meachem, President and Chief Executive Officer, Charlotte Housing Authority
- Scott Farmer, Executive Director, North Carolina Housing Finance Agency

Guiding questions:

- What's the status of affordable housing in Charlotte relative to demand? What are promising developments that have been spurred by the Leading on Opportunity Task Force? What are the major impediments to expanding access to affordable housing in Charlotte?
- What are the respective roles of the City of Charlotte, Mecklenburg County, and the State of North Carolina in advancing affordable housing? How has collaboration across governing entities changed – or not – since the Leading on Opportunity Task Force Report? How does state policy set the context in which this work happens, and what are the practical and political dynamics that are most important to understand?
- What federal programs are impacting access to affordable housing in Charlotte?
 Who administers these federal grants/incentives, and how are these resources influencing mobility work in Charlotte? What is the importance and role of the Local Initiatives Support Corporation (LISC)?
- How is gentrification, and the rising cost of housing, impacting access to affordable housing? In what ways is historic segregation being either addressed or exacerbated as Charlotte continues to grow and develop – both in terms of market developments and public-private partnerships seeking to advance mobility?

10:15 - 10:30 AM

Break

10:30 - 11:45 AM

Session III: How Social Capital Enables Productive Relationships and Mobility

Faculty:

- Molly Shaw, President and CEO, Communities In Schools (CIS), Charlotte-Mecklenburg
- Federico Rios Assistant Manager Equity and Immigration Integration,
 Charlotte
- Kandi Deitemeyer, President, Central Piedmont Community College

Guiding questions:

 What is being done to build social capital that increases mobility? How is social capital being defined for the mobility efforts underway in Charlotte?



- What's working, and where are the biggest opportunities to increase social capital?
 What are you learning about the challenges in building social capital that increases mobility?
- 20 years ago, Robert Putnam identified Charlotte as among the lowest in interracial trust and informal socialization across segregated communities. How are recent efforts to intentionally increase social capital addressing this legacy?
- How are faith communities and the private sector supporting and participating in the efforts to improve Charlotte's social capital?
- How is social capital being measured, for baseline and progress? How are interim measures being developed defined to measure growth to a goal or set of goals, and how can activities be aligned to those measures and goals to create a systemic, measurable, and accountable approach to increasing social capital?

11:45 – 12:30 PM Working Lunch with discussions of previous sessions

12:30 – 1:45 PM Session IV: Leading on Opportunity: Update on Progress

Faculty:

- Stephanie Kripa Cooper-Lewter, Executive Director, Leading on Opportunity
 Council
- Laura Clark, President and CEO, United Way of Central Carolinas
- Brian Collier, Executive Vice President, Foundation for the Carolinas
- Alanna Williams, Policy Associate, Opportunity Insights
- Rob Kelly, President and CEO, FORCLT

Guiding questions:

- How is the Leading on Opportunity Council advancing the recommendations of the Leading on Opportunity Task Force? How are public and private entities supporting and participating in this work?
- What are the biggest successes to date? How are those successes being measured and communicated?
- What are the biggest learnings in this work? What are the biggest challenges in advancing mobility in Charlotte, and what lessons would you share with others who want to advance a mobility agenda?
- How are federal programs specifically being utilized as part of these efforts, and what changes in policy would be most important in unlocking greater progress?

1:45 – 2:00 PM Break

2:00 – 3:00 PM Session V: Implications for Federal Policy

Faculty will be encouraged to share one take-away and one suggestion for ways in which the federal role can play a more effective role in Charlotte's efforts. The majority of time will be used for staff to engage with faculty and each other in considering Charlotte's efforts in the federal context.

3:00 – 3:15 PM Break + Complete Retreat Evaluation



3:15 - 3:50 PM Final I

Final Discussion

Congressional staff participants will share their take-aways and ideas for further exploration, future site visits and/or events in DC, and ideas/issues that are ripe for policy development.

3:50 PM

Adjourn

Staffer Arrival/Departure Times

Kara	Marchione	AA 400	10/2	8:38 AM	10/3	6:08 PM
Ryan	Martin	AA 400	10/2	8:38 AM	10/3	6:08 PM
Marisa	Morin	AA 400	10/2	8:38 AM	10/3	6:08 PM
Scott	Winship	AA 400	10/2	8:38 AM	10/3	6:08 PM
Jeffrey	Wrase	AA 400	10/2	8:38 AM	10/3	8:16 PM



Aspen Retreat for Senior Congressional Staff Network on Mobility from Poverty

One Community's Efforts to Increase Mobility with a Focus on Housing and Social

Omni Hotel 132 E. Trade St. Charlotte, NC 28202

October 2-3, 2019

CONGRESSIONAL STAFF

Kara Marchione

Education Policy Director
Senate HELP Committee
P: 202-494-0640
kara_marchione@help.senate.gov

Ryan Martin

Senior Human Services Advisor Finance Committee P: 202-494-9855 ryan martin@finance.senate.gov

Marissa Morin

Policy Advisor
U.S. Senate Finance
Committee
P: 603-817-1777
marisa morin@wyden.senate.gov

Scott Winship

Executive Director Joint Economic Committee P: 202-407-1237 scott_winship@jec.senate.gov

Jeffrey Wrase

Deputy Staff Director and Chief Economist U.S. Senate Finance Committee P: 202-351-9608 ieff_wrase@finance.senate.gov



FACULTY

Laura Clark

4. 464.

President and CEO
United Way of Central Carolinas
301 South Brevard Street
Charlotte, NC 28202

Brian Collier

Executive Vice President Foundation for the Carolinas 220 N Tryon Street Charlotte, NC 28202

Khandi Deitemeyer

President
Central Piedmont Community College
220 N Tryon Street
Charlotte, NC 28235

Stephanie Kripa Cooper-Lewter, Ph.D.

Executive Director
Leading on Opportunity
428 East 4th Street, Suite 407
Charlotte, NC 28202

Scott Farmer

Executive Director North Carolina Housing Finance Agency 3508 Bush Street Raleigh, NC 27609

Ophelia Garmon-Brown, MD, M.Div.

Chief Community Health and Wellness Officer Novant Health 108 Providence Road, 3rd Floor Charlotte, NC 28207

Rob Kelly

President and CEO FORCLT 7427 Matthews-Mint Hill Rd. Ste. 105-199 Charlotte, NC 28227

William H. "Mack" McDonald

Chief Executive Officer
Renaissance West Community Initiative
3610 Nobles Ave #199
Charlotte, NC 28208

A. Fulton Meachem, Jr.

President and Chief Executive Officer Charlotte Housing Authority(CHA) 400 East Blvd Charlotte, NC 28203

Dionne Nelson

President and CEO
Laurel Street Residential
511 East Blvd
Charlotte, NC 28203

Dee O'Dell

Executive Vice President Consumer Business and Banking U.S. Bank Charlotte, NC 28202

Richard V. Reeves

John C. and Nancy D. Whitehead Chair Senior Fellow - Economic Studies Director - Future of the Middle-Class Initiative Co-director - Center on Children and Families Brookings Institution 1775 Massachusetts Ave., NW Washington, DC 20036

Federico Rios

Assistant Director
Office of Equity Mobility and Immigrant
Integration
11720 Allen a. Brown Road
Charlotte, NC 28269

Molly Shaw

Executive Director Communities In School (CIS) 601 E. 5th Street, Suite 300 Charlotte, NC 28202

Anthony Trotman

Assistant County Manager Charlotte Mecklenburg Government 3508 Bush Street Raleigh, NC 27609

Alanna Williams

Policy Associate
Opportunity Insights
Harvard University
1280 Massachusetts Avenue



STAFF, ADVISORS & FUNDERS

Ann Clark

Aspen Institute Congressional Consultant 275 Knoxview Lane Mooresville, NC 28117 abclarkbhi@roadrunner.com

Doug Mesecar

Aspen Institute Congressional Consultant 13981Fern Valley Lane Leesburg, VA 20176 703-887-3738 dougmesecar@gmail.com

Ryan Rippel

Director
Bill & Melinda Gates Foundation
P.O. Box 23350
Seattle, WA 98102
P: 206-370-8295
ryan.rippel@gatesfoundation.org
Asst: Traci Terry
P: 206-295-8660
Traci.terry@gatesfoundation.org

Ross Wiener

Vice President and Executive Director Aspen Education & Society Program 2300 N Street NW, Suite 700 Washington, DC 20037 P: 202-736-5817 ross.wiener@aspenst.org

Caira Woods

Bill & Melinda Gates Foundation 1300 I Street NW Washington, DC 20005 Caira_wood@gatesfoundation.org